

Terms of reference (ToR) for the procurement of services below the EU threshold

CONFIDENTIAL

PROVISION OF MICROSOFT OFFICE TRAINING FOR GIZ OFFICE PRETORIA	Project number/ cost centre: 96.9250.0-001.99
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0. List of abbreviations

AG	Commissioning party
AN	Contractor
GTCC	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
KZFK	Short-term expert
ToRs	Terms of reference

1. Context

As a federally owned enterprise of the German Government, The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH supports the South African Government in terms of sustainable development. GIZ operates in more than 120 countries around the globe. It has been present in South Africa since 1993.

Bilateral programmes and projects in the areas of Governance and Administration, Green Economy, Skills Development as well as HIV and AIDS prevention in South Africa are complemented by Regional, Pan-African, and global projects. There are approximately 270 people currently working for GIZ in South Africa, Lesotho, and Eswatini.

The GIZ Südafrika/Lesotho/eSwatini intends to conclude a contract with **service provider** to provide Microsoft Office Training for its employees.

The aim of this assignment, for the service provider to provide Microsoft Word, Excel and PowerPoint to employees in South Africa/ Lesotho / eSwatini. The services shall be carried out virtually and only where necessary in person.

The contract will be until 31 December 2027 with the possibility of extension for another one year.

2. Tasks to be performed by the contractor

The service provider will offer the following training for Microsoft Word, Excel and Power Point for GIZ South Africa, and Lesotho Nominated Staff for their applicable proficiency level:

MS Word Level 1 (Basic)
MS Word Level 2 (Intermediate)
MS Word Level 3 (Advanced)
MS Excel 1 (Basic)
MS Excel 2 (Intermediate)
MS Excel 3 (Advanced)
MS PowerPoint 1 (Basic)
MS PowerPoint 2 (Intermediate)
MS PowerPoint 3 (Advanced)

Microsoft Excel	Level 1 Basic 2 Days Create, open, and save spreadsheets, perform calculations, modify, and format worksheets, and utilize printing features.	Level 2 Intermediate 2 Day Intermediate Excel skills (formulas, charts, calculations) etc.	Complexed Formulas 2 Days Manipulating the screen display Advanced formatting, Advanced functions and features, Future Value Function.
Microsoft Word	Level 1 Basic 2 Days Manage multiple documents, apply text and paragraph formatting, customize page layouts, and use templates effectively,	Level 2 Intermediate 2 Days Intermediate Word processor skills (tables, diagrams, borders)	Level 3 Advanced 2 Days More complexed Microsoft Word applications.
Microsoft Power Point	Level 1 Basic 1 Day Prepare and create presentations	Level 2 Intermediate 2 Days Customize views and preferences of slides, manage multiple presentations, incorporate special effects, and prepare for delivering presentations.	Level 3 Advanced 2 Days Advanced tools and features in Microsoft PowerPoint, Customize design, Work with Media Build advanced transitions and animation Finalize presentations & customize presentations.

Employees are to be split based on their proficiency level.

- The contractor is responsible for providing qualified and certified instructors to offer the course/classes to nominated staff members.
- In the levels where applicable ensure that the participants are enrolled, provided with Course schedule (timeframe and deadlines) as well as Course materials.
- The contractor is also to provide certificates to each participant at the end of the course for each staff verifying/confirming the achievement and completion of the level.
- The contractor is expected to manage costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
- The contractor should have an understanding of General Data Protection Regulation, a set of EU rules on data protection and privacy as well as the South African Protection of Personal Information Act **4 of 2013** (POPIA).

Period of assignment: from **01 February 2026 until 31 December 2027 with the possibility of extension for another one year.**

GDPR or understanding nuances of EU data protection principles as well as the Protection of Personal Information Act 4 of 2013

The contractor is responsible for providing the following services:

- Microsoft Office Training to GIZ Office Pretoria.
- The contractor is responsible for selecting, preparing, training and steering the international and national, short and long-term experts assigned to perform the advisory tasks.
- The contractor provides equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
- The contractor reports regularly to GIZ in accordance with the current AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

In addition to the reports required by GIZ in accordance with the AVB, the contractor submits the following reports:

- Inception report
- Brief quarterly or half-yearly reports on the implementation status of the project

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Deadline/place/person responsible
Microsoft Office Word Level 1 to 3 Proficiency	31 December 2027
Microsoft Office Excel Level 1 to 3 Proficiency	31 December 2027
Microsoft Office PowerPoint Level 1 to 3 Proficiency	31 December 2027

Period of assignment: from 01 February 2026 until 31 December 2027.

3. Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to present and explain its approach to **steering** the measures with the project partners (1.3.1) and its contribution to the **results-based monitoring system** (1.3.2).

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) and GIZ and to promote scaling-up effects (1.5.2) under **learning and innovation**.

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

The tenderer is required to describe its backstopping concept. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the tender in accordance with Section 3.3.1 of the GIZ AVB:

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between the tenderer and GIZ
- Assuming personnel responsibility for the contractor's experts
- Process-oriented steering for implementation of the commission
- Securing the administrative conclusion of the project

4. Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Team leader

Tasks of the team leader

- Overall responsibility for the advisory packages of the contractor (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines

Qualifications of the team leader

- Education/training (2.1.1): university degree in Education or relevant
- Language (2.1.2): C2-level language proficiency in English
- Specific professional experience (2.1.4): 10 years in Teaching Microsoft Office Training
- Regional experience (2.1.6): 10 years of experience in projects in SADC (region), of which 8 years in projects in South Africa
- Development cooperation (DC) experience (2.1.7): 10 years of experience in DC projects

Key expert 1

Tasks of key expert 1

- Conduct the lessons and support the participants during the training.
- Provide participants with Course schedule (timeframe and deadlines) as well as Course materials.
- Regular reporting and providing deliverables in accordance with deadlines.

The contractor must provide a clear overview of all proposed short-term experts and their individual qualifications.

Qualifications of key expert 1

Qualifications of key expert 1

- Education/training (2.2.1): Certificate Teaching Microsoft Office Training (Word, Excel and Powerpoint)
- Language (2.2.2): C2 -level language proficiency in English
- Specific professional experience (2.2.4): 5 Years of professional experience in teaching Microsoft Office Training (Word, Excel and Powerpoint)
- Regional experience (2.2.6): 3 Years of experience in SADC region.
- Development Cooperation (DC) experience (2.2.7): 5 Years experience in DC
- Other (2.2.8): N/A

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Team skills
- Initiative
- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

Short-term expert pool with minimum 4, maximum 8 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

- Conduct the lessons and support the participants during the training.
- Provide participants with Course schedule (timeframe and deadlines) as well as Course materials.
- Regular reporting and providing deliverables in accordance with deadlines.

Qualifications of the short-term expert pool

- Education/training (2.6.1): 2 experts with certificate in teaching the Microsoft Office Training (Word, Excel and Powerpoint)
- Language (2.6.2): 2 experts with C2-level language proficiency in English

- Specific professional experience (2.6.4): 2 experts with 5 years of professional experience in teaching Microsoft Office Training (Word, Excel and Powerpoint)
- Regional experience (2.6.5): 2 experts with 3 years of experience in SADC region.
- Development cooperation (DC) experience (2.6.6): 1 expert with 5 years of experience in DC

5. Costing requirements

Fees

This fee will be indicated in the budget template provided as part of quotation upon receiving participant list for each year. (The cost is per person and GIZ staff will attend training at the service provider premises)

Microsoft Word Level 1 and 3	60.00
Microsoft Word Level 2	20.00
Microsoft Excel Level 1	20.00
Microsoft Excel Level 2	40.00
Microsoft Excel Level 3	40.00
Microsoft Powerpoint Level 1 and 2	80.00
Microsoft Powerpoint Level 3	40.00

Per diem allowances are reimbursed as a lump sum up to the maximum amounts permissible under tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable from the [German Federal Ministry of Finance – tax treatment of travel expenses and allowances for international business travel as of 1 January 2024/2025 \(GERMAN ONLY\)](#)).

Accommodation allowances are reimbursed as detailed in the specification of inputs below.

With special justification, additional Accommodation costs up to a reasonable amount can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

CO₂ emissions caused by air travel must be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance \(German only\)](#)

has published a [list of standards \(German only\)](#). GIZ recommends using the standards specified there.

Workshops, events and trainings

The contractor implements the *training courses at their own premises*.

6. Inputs of GIZ or other actors

N/A

7. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English.

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English.

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

8. Option

After the services put out to tender have been completed, important elements of these tasks can be continued or extended. Specifically:

Type and scope

The contractor is responsible for providing the following optional services:

- Microsoft Office Training to GIZ Office Pretoria.
- The contractor is responsible for selecting, preparing, training and steering the international and national, short and long-term experts assigned to perform the advisory tasks.
- The contractor provides equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
- The contractor reports regularly to GIZ in accordance with the current AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

Requirements

Exercising the option will depend on successful training of 2026 to 2027. The decision on continuation is expected to be made in the period June 2027. If the option is exercised, it is anticipated that the contract term will be extended from 1 January 2028 to 31 December 2028 for a period of 1 year.

The option will be exercised by means of a contract extension on the basis of the individual approaches already offered.

Quantitative requirements for the optional services

Microsoft Word Level 1 and 3	30.00
Microsoft Word Level 2	10.00
Microsoft Excel Level 1	10.00
Microsoft Excel Level 2	20.00
Microsoft Excel Level 3	20.00
Microsoft Powerpoint Level 1 and 2	40.00
Microsoft Powerpoint Level 3	20.00

Requirements on the format of the tender for the option

Please complete both spreadsheets in the price schedule, i.e. one for the main service and one for the optional service.